PI Dashboard Navigation Tips

An outline of features and tools available across the PI Dashboards.

1. To see your data, **enter your name in the PTA Manager field**, and click **Apply**.

Set filters as needed.

Caltech

🔽 **PI Portfolio**

Capra, Frank ▾ | Apply |

FY Period

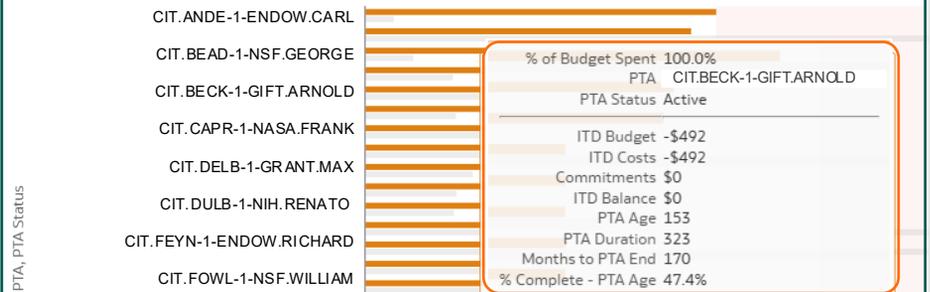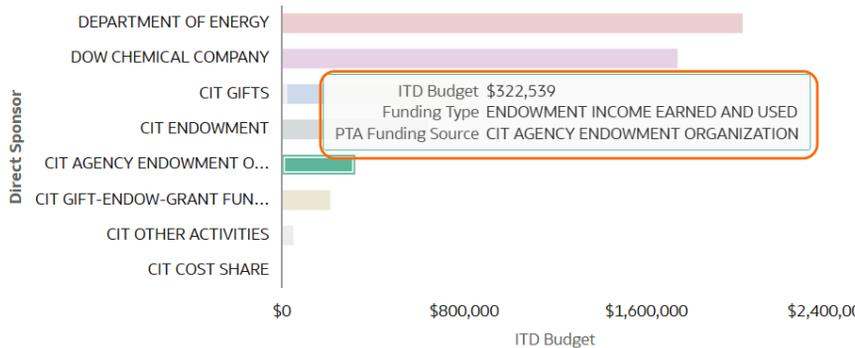Current Period ▾

PTA Filters

PTA

All ▾

2. **See additional data and details** by hovering over any data point in any section.

Additional details vary by section.

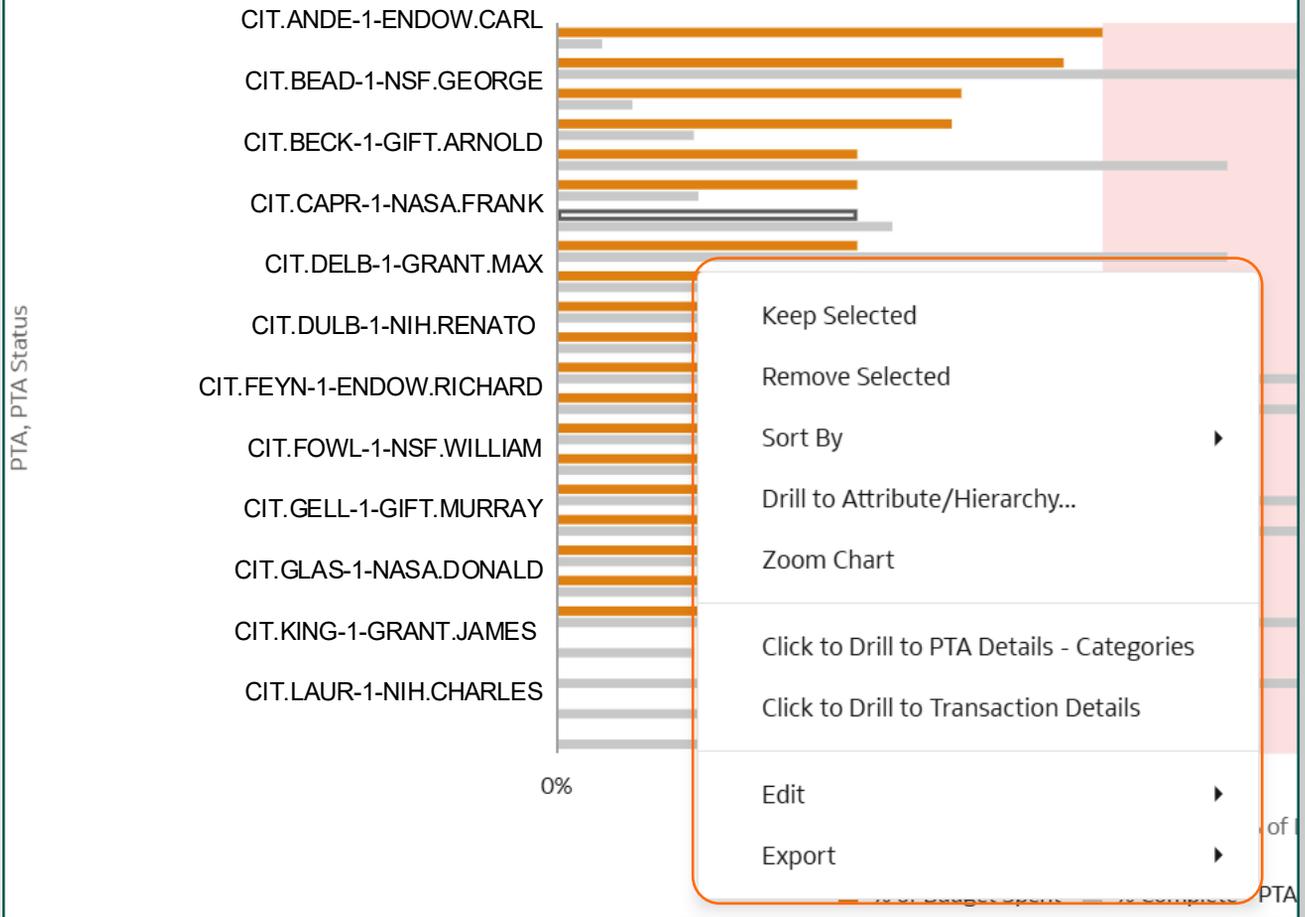**How are my PTAs performing regarding time and budget?**

CIT.ANDE-1-ENDOW.CARL
CIT.BEAD-1-NSF.GEORGE
CIT.BECK-1-GIFT.ARNOLD
CIT.CAPR-1-NASA.FRANK
CIT.DELB-1-GRANT.MAX
CIT.DULB-1-NIH.RENATO
CIT.FEYN-1-ENDOW.RICHARD
CIT.FOWL-1-NSF.WILLIAM

% of Budget Spent	100.0%
PTA	CIT.BECK-1-GIFT.ARNOLD
PTA Status	Active
ITD Budget	-$492
ITD Costs	-$492
Commitments	$0
ITD Balance	$0
PTA Age	153
PTA Duration	323
Months to PTA End	170
% Complete - PTA Age	47.4%

100%   200%

% of Budget Spent

■ % of Budget Spent   ▢ % Complete - PTA Age

Who are my Top Direct Sponsors?

DEPARTMENT OF ENERGY
DOW CHEMICAL COMPANY
CIT GIFTS
CIT ENDOWMENT
CIT AGENCY ENDOWMENT O...
CIT GIFT-ENDOW-GRANT FUN...
CIT OTHER ACTIVITIES
CIT COST SHARE

ITD Budget	$322,539
Funding Type	ENDOWMENT INCOME EARNED AND USED
PTA Funding Source	CIT AGENCY ENDOWMENT ORGANIZATION

$0 $800,000 $1,600,000 $2,400,00

ITD Budget

PI Dashboard Navigation Tips

An outline of features and tools available across the PI Dashboards.

3. Right click on a data point to view the **Tool Tips menu** with actions you can take. For example:

- **Sort by** various values to customize your view
- **Click Drill to…**to navigate to other dashboards
- **Export** the data to a PDF, PPT, Image or CSV

## How are my PTAs performing regarding time and budget?

CIT.ANDE-1-ENDOW.CARL
CIT.BEAD-1-NSF.GEORGE
CIT.BECK-1-GIFT.ARNOLD
CIT.CAPR-1-NASA.FRANK
CIT.DELB-1-GRANT.MAX
CIT.DULB-1-NIH.RENATO
CIT.FEYN-1-ENDOW.RICHARD
CIT.FOWL-1-NSF.WILLIAM
CIT.GELL-1-GIFT.MURRAY
CIT.GLAS-1-NASA.DONALD
CIT.KING-1-GRANT.JAMES
CIT.LAUR-1-NIH.CHARLES

PTA, PTA Status

| Keep Selected |
| Remove Selected |
| Sort By ▸ |
| Drill to Attribute/Hierarchy… |
| Zoom Chart |
| Click to Drill to PTA Details - Categories |
| Click to Drill to Transaction Details |
| Edit ▸ |
| Export ▸ |

0%

% of Budget Spent   % Complete   PTA

4. Use the **Back to…** buttons to navigate easily between dashboards.

Caltech

PTA Details Dashboard
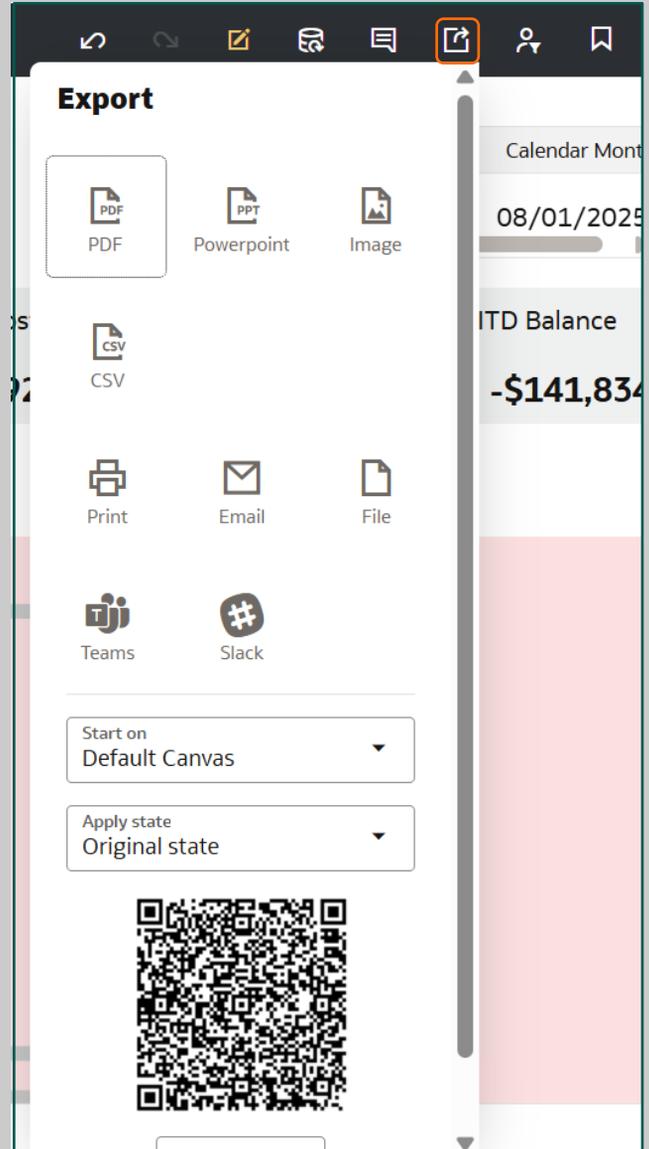
CIT.CAPR-1-NASA.FRANK

Back to PTA Portfolio

5. To **expand** any section into full-screen view, hover over the top and select the expand icon. From the same menu bar, you can **export** (⬈) or **see more options** (⋮).
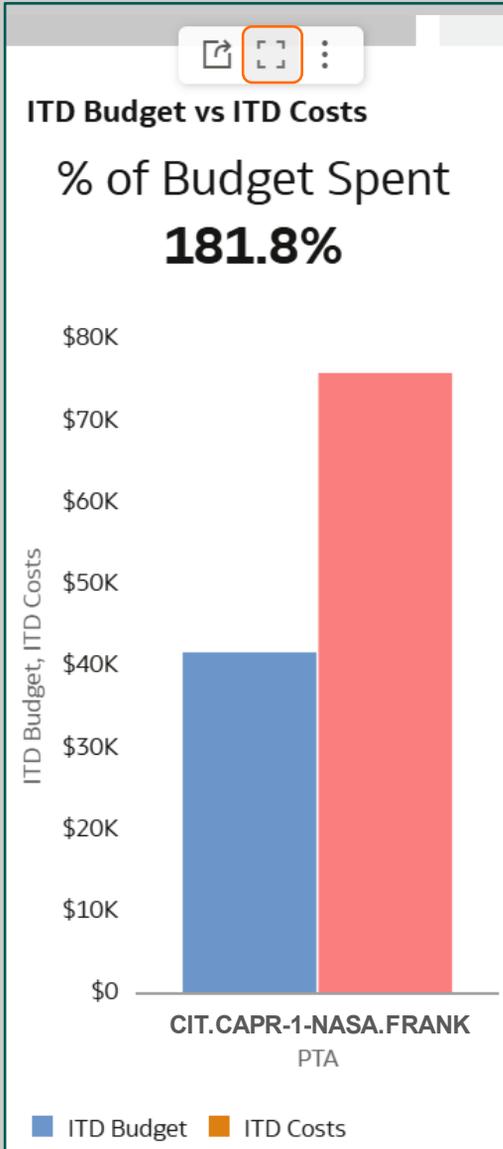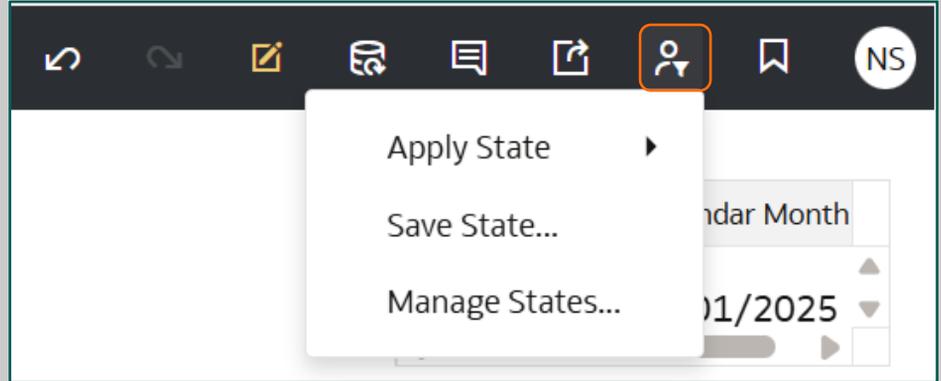
6. In addition to **exporting data** from each graph, you can also export the entire dashboard's data from the export icon on the toolbar in the top right.
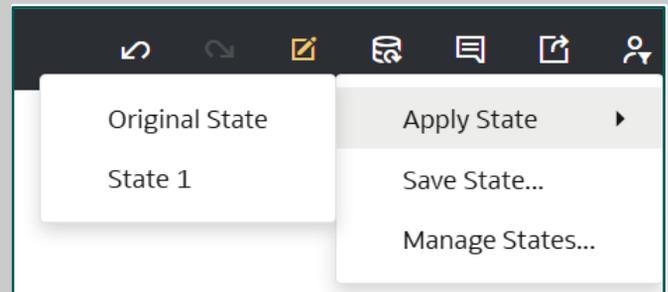
7. **States** can be saved for your dashboards to preserve filters and simplify filter applications with each login.

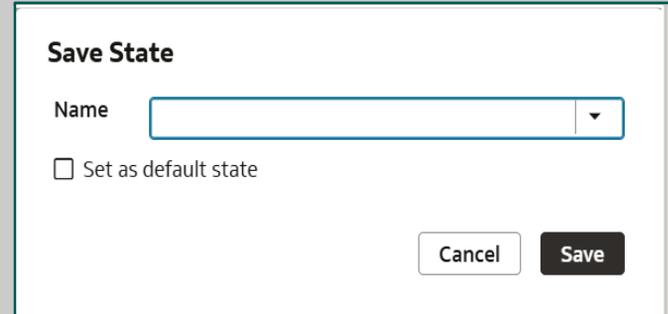Open the **State Menu** from the person icon in the toolbar. You can save multiple states for each dashboard.

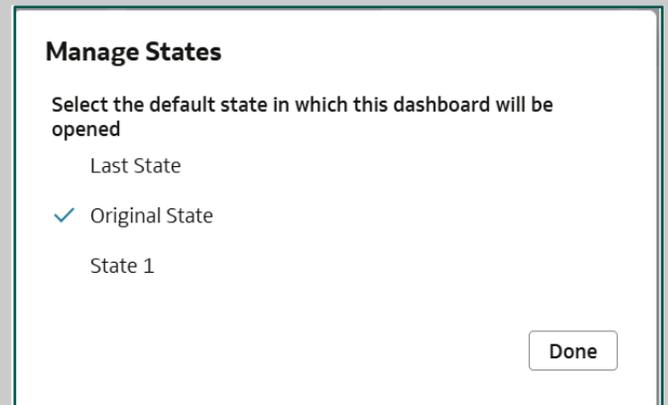**Apply State** to select the state you'd like to view.

Save State to save current filters into a new state.
Apply a unique name and click **Save**.
Your new state will now be available under the Apply State dropdown.

Manage States to select the default state. Your dashboard will open with the default state you select.
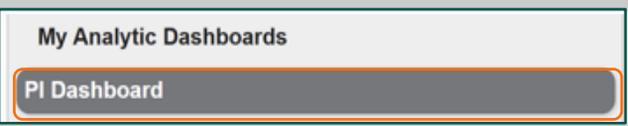Click **Done** to save your selection.

PTA Portfolio PI Dashboard

A summary of the sections and graphs available in the dashboard.

1. From the Data Warehouse homepage under **My Analytic Dashboards**, select **PI Dashboard.**

My Analytic Dashboards

PI Dashboard

2. **PTA Portfolio Dashboard** is a landing page to view relevant PTA information.

Find information about:
- PTA Time and Budget Summaries
- Staffing Details
- Sponsors
- Funding Types

Use the **filters menu** to narrow results. Click **Apply** for filters to take effect and **Reset** to return to baseline.

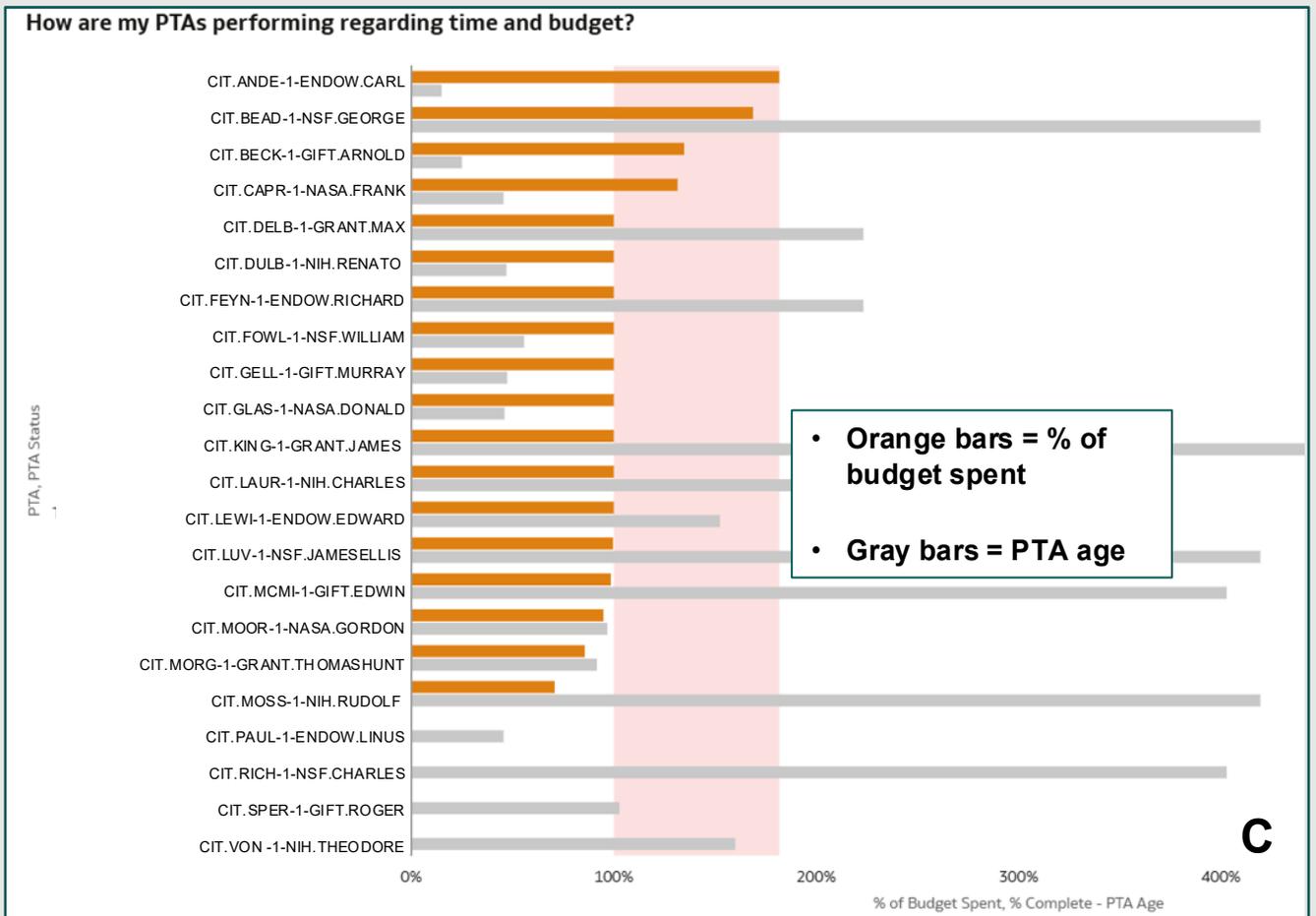**Tips:**
- Hover over any bar/point/section in any graph to see additional data.

- Hover over the top of any section and select the **export** icon to export the data, or the **expand** icon to view the section in full-screen.

PTA Portfolio

PTA Portfolio PI Dashboard

A summary of the sections and graphs available in the dashboard.

3. **KPIs: Key Performance Indicators** summarize your PTA Portfolio data.

Caltech	PTA Portfolio Dashboard					**B**	FY Period	Calendar Month
							AUG-FY2025	08/01/2025

🔵 PI Portfolio	# of PTAs	# of PTAs over Budget	# of PTAs Past End Date	ITD Budget	ITD Costs	ITD Commitments	ITD Balance
Anderson, Carl	22	5	12	$4,061,789	$4,187,897	$15,725	-$141,834

4. **Time and Budget** is a summary of your active PTAs.

How are my PTAs performing regarding time and budget?

- **Orange bars = % of budget spent**

- **Gray bars = PTA age**

% of Budget Spent, % Complete - PTA Age

C

PTA Portfolio PI Dashboard

A summary of the sections and graphs available in the dashboard.

5. **PTA Summary** displays the time and budget for each of your active PTAs.
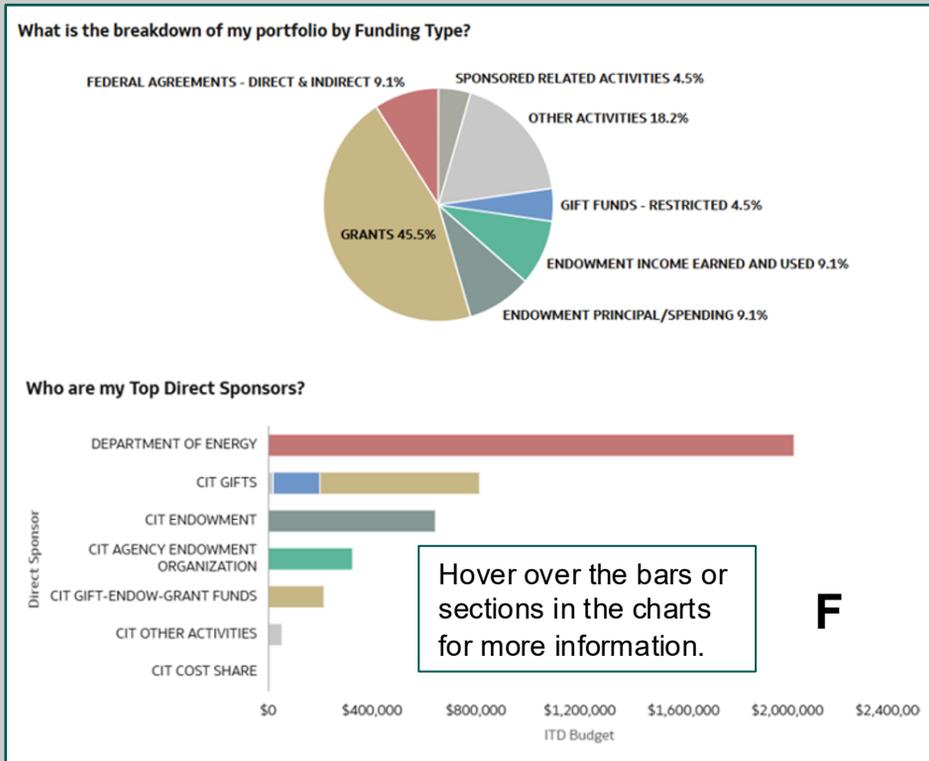
PTA Summary

PTA	PTA Start ▲	PTA End	PTA Status	% of Budget Spent ▼	ITD Budget	ITD Costs	Period Costs	Commitments	Monthly Burn Rate	ITD Balance	% Complete - PTA Age	Age in Months - PTA	PTA Duration
CIT.ANDE-1-ENDOW.CARL	31-Oct-18	31-Aug-23	Active	100.0%	$69,568	$69,568	$0	$0	$859	$0	139.7%	81	58
CIT.BEAD-1-NSF.GEORGE	01-Oct-20	30-Sep-34	Active	100.0%	$64,242	$64,242	$0	$0	$1,108	$0	34.5%	58	168
CIT.BECK-1-GIFT.ARNOLD	01-Jan-21	30-Jun-25	Active	100.0%	$215,000	$215,000	$0	$0	$3,909	$0	101.9%	55	54
CIT.CAPR-1-NASA.FRANK	01-Feb-22	31-Dec-25	Active	103.8%	$260,538	$270,462	$0	$0	$6,440	-$9,924	89.4%	42	47
CIT.DELB-1-GRANT.MAX		31-Dec-25	Active	84.5%	$249,461	$210,834	$1,129	$38,627	$5,020	$0	89.4%	42	47
CIT.DULB-1-NIH.RENATO	15-Jun-22	31-May-25	Active	99.8%	$335,318	$334,706	$0	$0	$8,808	$612	105.6%	38	36
CIT.FEYN-1-ENDOW.RICHARD	01-Oct-22	30-Sep-39	Active	2.5%	$24,064	$608	$0	$0	$18	$23,456	16.7%	34	204
CIT.FOWL-1-NSF.WILLIAM	28-Apr-23	15-Nov-24	Active	100.0%	$100,000	$99,999	$0	$0	$3,704	$1	142.1%	27	19
CIT.GELL-1-GIFT.MURRAY		14-Jun-24	Active	69.4%	$45,953	$31,898	$0	$0	$1,227	$14,055	216.7%	26	12
CIT.GLAS-1-NASA.DONALD		14-Jun-24	Active	1.7%	$672,342	$11,746	$0	$0	$452	$660,596	216.7%	26	12
CIT.KING-1-GRANT.JAMES …	15-Jun-23												

D

ITD Balance < 0

6. **Personnel Overview** shows who is working on each of your PTAs, and details about salary activity and labor commitment.

PTA Personnel Overview

PTA	PTA Award Manager	Award Division	Personnel Name	Personnel Type	ITD Salary Activity	Labor Commitment
CIT.GELL-1-GIFT.MURRAY	Capra, Frank		Fowler, Richard	Academic Faculty	$0	
CIT.GLAS-1-NASA.DONALD					$0	
CIT.KING-1-GRANT.JAMES	Capra, Frank		Fowler, Richard	Academic Faculty	$21,216	
			Lewis, Edward	Student-Employee	$14,277	
			Beadle, George	Academic Non-Faculty	$2,808	
			So, Takao	Academic Non-...	$18,750	

E

7. **Direct Sponsors and Funding Types** displays information about your direct sponsors, funding sources, and funding types. Click a graph or chart to zoom in.

PTA Details PI Dashboard

A summary of the sections and graphs available in the dashboard.

1. To open the **PTA Details** Dashboard, select one of the PTAs from the **Time and Budget** graph on the PTA Portfolio Dashboard.

How are my PTAs performing regarding time and budget?

CIT.ANDE-1-ENDOW.CARL
CIT.BEAD-1-NSF.GEORGE
CIT.BECK-1-GIFT.ARNOLD

2. **PTA Details Dashboard** is a landing page to view details about a specific PTA.

Find information about:
- KPIs
- Budget/Cost Details
- Burn Rate
- Labor Commitment

Tips:
- Hover over any bar/point/section in any graph to see additional data.

- Hover over the top of any section and select the **export** icon to export the data, or the **expand** icon to view the section in full-screen.

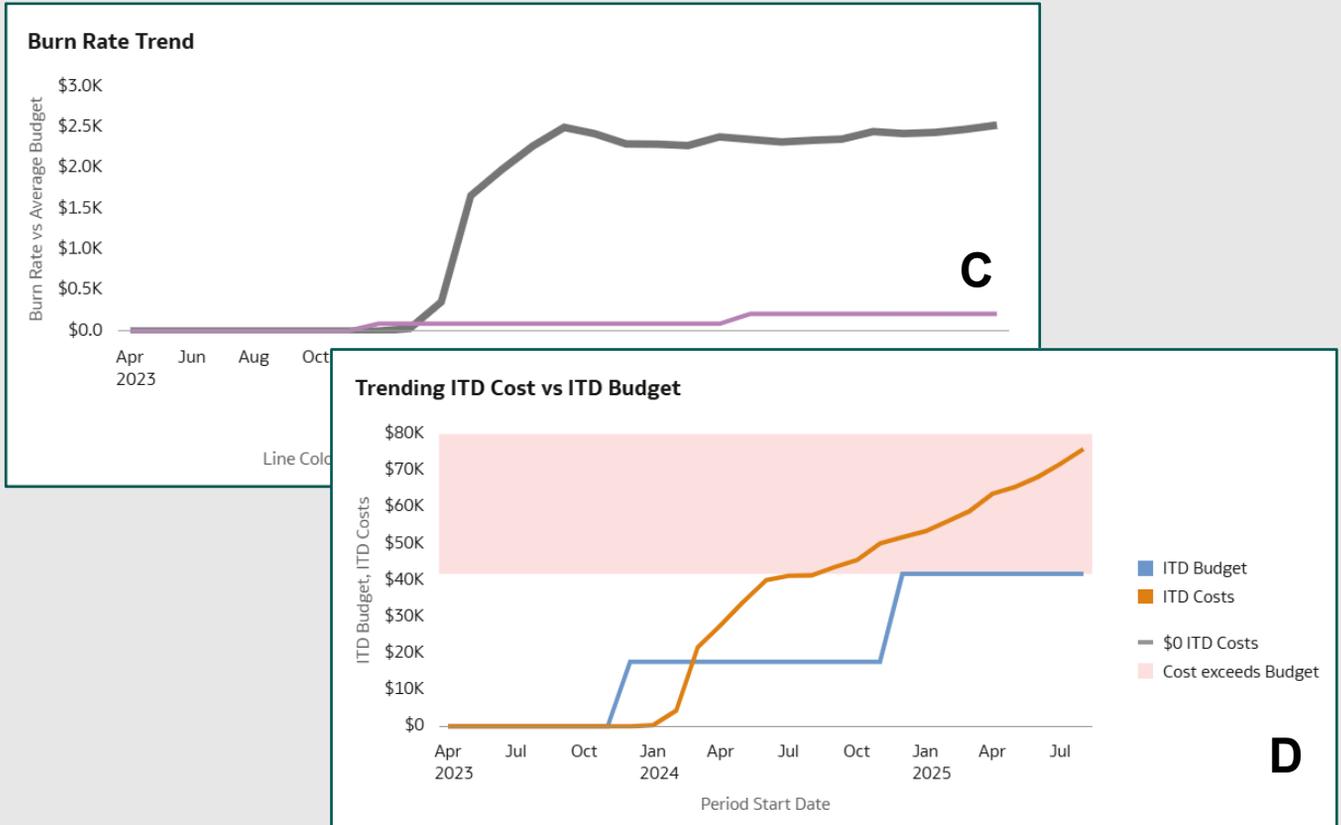3. **KPIs: Key Performance Indicators** summarize data for this PTA.

PTA Details Dashboard	PTA Start	PTA End	PTA Status	Award Manager	Project Manager	Task Manager	FY Period	Calendar Month
CIT.ANDE-1-ENDOW.CARL	06/03/2010	07/31/2011	Closed	Beadle, George	Beckman, Arnold	Beckman, Arnold	AUG-FY2025	08/01/202

Back to PTA Portfolio

	% of Budget Spent	ITD Budget	ITD Costs	ITD Commitments	ITD Balance
FY Period Current Period	**100.0%**	**$84,483**	**$84,483**	**$0**	**$0**

	% Complete	Period Burn Rate	Months to PTA End	Est. Months to $0 Balance	Period Count of Personnel
PTA CIT.ANDE-1-ENDOW.CARL	**1,300.0%** % Remaining -1,200.0%	**$464** Average Period Budget $6,034	**-168**	**0.0**	**0**

A

PTA Details PI Dashboard

A summary of the sections and graphs available in the dashboard.

4. **Budget vs Actuals** shows PTA budgets and costs details by expenditure category.

ITD Budget vs ITD Costs

% of Budget Spent
181.8%

Budget vs Actuals by Expenditure Category

Budget, Cost, and Commitments by Expenditure Category

	Expenditure Category	ITD Budget	ITD Costs	Commitments
10	Unrestricted Transfers	$0	$13,355	$0
35	Other Faculty Salaries	$0	$220	$0
37	Staff Salaries	$0	$3,539	$0
39	All Other Salaries	$0	$12,042	$0
60	Staff Benefits Allocation	$0	$55	$0
65	Dental Insurance	$0	$715	$0
	Health Insurance	$0	$15,766	$0
70	Tuition Remission Allocation	$0	$6,888	$0
80	Materials and Supplies	$41,739	$19,045	$108
	Travel	$0	$4,248	$0
Grand Total		**$41,739**	**$75,872**	**$108**

B

5. **Burn Rate and Costs by Month** shows trends with burn rate and costs vs budget expectations.

Burn Rate Trend

C

Trending ITD Cost vs ITD Budget

- ITD Budget
- ITD Costs
- — $0 ITD Costs
- Cost exceeds Budget

D

PTA Details PI Dashboard

A summary of the sections and graphs available in the dashboard.

6. **Costs by Month** breaks down spending by expenditure category per month.

Expenditure Category Spend by Month

▲	Expenditure Category	04/01/2023	05/01/2023	06/01/2023	07/01/2023
10	Unrestricted Transfers				
35	Other Faculty Salaries				
37	Staff Salaries				
39	All Other Salaries				
60	Staff Benefits Allocation				
65	Dental Insurance				
	Health Insurance				
70	Tuition Remission Allocation				
80	Materials and Supplies	$0	$0	$0	$0
	Travel				
Grand Total		$0	$0	$0	$0

G

Period Costs $0

Salary Costs by Month

Personnel	04/01/2024	05/01/2024	06/01/2024	10/01/2024	11/01/2024
Beadle, George					
Beckman, Arnold					$750
Capra, Frank					
Delbrück, Max	$3,750	$3,750	$3,750		
Dulbecco, Renato				$22	$22
Feynman, Richard					
Fowler, William					$750
Gell-Mann, Murray	$3,750	$3,750	$3,750	$22	$1,522

H

Cost $0

Materials and Supplies Costs by Month

Supplier	Provider	Personnel	08/01/2018	09/01/2018	10/01/2018	11/01/2018	12/01/2018	01/01/2019	02/01/2019
CAMBRIDGE ISOTOPE LABORATORIES INC	CAMBRIDGE ISOTOPE LABORATORIES INC	Capra, Frank							
		Delbrück, Max						$89	$1,728
		Dulbecco, Renato							

I

Cost -$3K ▬▬▬ $3K

Travel Costs by Month

Personnel	09/01/2022	01/01/2023	02/01/2023	03/01/2023	06/01/2023	08/01/2023	05/01/2024
Beadle, George							$92
Beckman, Arnold							
Capra, Frank				$600		$400	
Delbrück, Max		$432					
Dulbecco, Renato			$200		$734		
Feynman, Richard	$559						
Grand Total	$559	$432	$200	$600	$734	$400	$92

E

Equipment Costs by Month

Supplier	Provider	02/01/2023	12/01/2023	Grand Total
PARR INSTRUMENT COMPANY	PARR INSTRUMENT COMPANY		$3,051	$3,051
PIKE TECHNOLOGIES OF WI INC DBA PIKE TECHNOLOGIES INC	PIKE TECHNOLOGIES OF WI INC DBA PIKE TECHNOLOGIES INC	$4,145		$4,145
Grand Total		$4,145	$3,051	$7,196

F

PTA Details PI Dashboard

A summary of the sections and graphs available in the dashboard.

7. **Commitment** information is available for all materials and supplies, as well as personnel staffed on the PTA.

Commitment Summary

Expenditure Category	Expenditure Type	Provider	Reference #	Exp Comment	Exp Item Date	Commitment
Materials and Supplies	Computing Services	SLACK T01UDE73QH	CQP270865	Communication Tool	07/17/2025	$11
	Dues - Unallocable	AMERICAN PHYSICAL SOCI	CQP270634	Renew	07/17/2025	$39
	Entertainment	PIXEL ROOMS	CQP270634	Entertainment with Attendees	07/16/2025	$297
		RAFFI'S PLACE	CQP270865	Entertainment with Attendees	07/17/2025	$307
	Supplies - Unallocable	AMERICAN PHYSICAL SOCI	CQP270634	APS Membership renewal	07/23/2025	$39
		TRADER JOE S	CQP270634	Refreshment supplies	07/29/2025	$11
				Refreshments	07/15/2025	$9
				Refreshments for Group Meetings	07/22/2025	$6

J

Period Labor Commitment Summary

Personnel	Labor Commitment
Beadle, George	$0
Beckman, Arnold	$0
Capra, Frank	$0
Delbrück, Max	$0
Dulbecco, Renato	$0
Feynman, Richard	$8,467
Fowler, William	$16,652
Gell-Mann, Murray	$0
Glaser, Donald	$1,570
King, Jr., James	$16,652

K
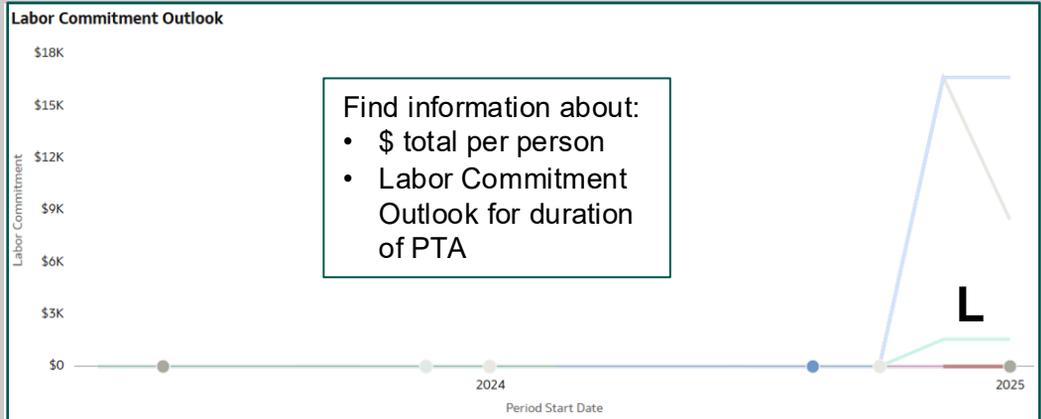
Labor Commitment Outlook

Find information about:
- $ total per person
- Labor Commitment Outlook for duration of PTA

L

1. From any graph on the **PTA Portfolio Dashboard**, hover over a PTA to see the pop-up menu. **Click to Drill to Transaction Details.**

2. The **Transaction Details Dashboard** includes details at the transaction level for a given PTA.